

# THE DEEP DOCUMENT

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## The Definition, Ethics and Exemplary Practices of Experiential Training and Development

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**Version 6.2**  
**March 18, 1999**

**Written and Edited by the DEEP Task Force**

Jim Bronson, Performance Dynamics, Inc.

Moe Carrick, Project Adventure, Inc.

Betsy Dalglish, Falls River Center, Inc.

Faith Evans, PlayFully, Inc.

Bill Proudman, Chair, Inclusivity Consulting Group, Inc.

Steve Proudman, The Proudman Group, Inc.

Mark Weaver, Axis Consulting, Inc.

Jim Willis, Executive Edge, Inc.

**With Contributions from the  
DEEP ETD Reader Group  
and Participants at the 1997 and 1998 DEEP Symposiums**

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**ACKNOWLEDGEMENTS**

The process of creating an ETD definition, code of ethics and set of exemplary practices, with input from a broad spectrum of providers and practitioners for an emerging Experiential Training and

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Development (ETD) profession, was not an easy task. Throughout this eighteen-month process we have had much back and forth dialogue about everything from the content pieces of the document to the viability and usefulness of the whole initiative itself. Through it all, a number of providers and practitioners were readily available to offer helpful feedback. Their efforts were instrumental in the completion of this document.

The Task Force would specifically like to thank the following people:

**Ellerie Brownfain**, in her role, as the EBTD Professional Group chair, for her willingness to make the bold initial commitment to support the initiative.

**Mary Butler and Richard Romero**, as convenors of the 1997 EBTD pre-conference in North Carolina for creating space in their conference schedule for Bill Proudman to conduct the first day long DEEP symposium for 40 practitioners.

**Sylvia Dresser** for her detailed review of this document for grammatical and formatting suggestions.

**Mark Havens** for his work about the definition of experiential training and development that led to the evolution of the definition in the current document.

**Cheryl Perlitz**, as the 1998 EBTD pre-conference convenor at Lake Tahoe, for her support and effort in scheduling the second DEEP symposium.

Finally, we would like to thank the numerous people from the DEEP Reader Group who responded to our drafts with their comments as well as those who attended the two DEEP Symposiums and whose comments resulted in version 1 and version 6 of the document. Listed below is our best attempt to acknowledge some of the many people who provided critical feedback which assisted the task force in arriving at this final document.

Jeff Alevy	Katy Angstadt	Joseph Bailey	Bart Berry	Austin Birch
Anna Birch	Paul Botticello	Rich Boyer	Ellerie Brownfain	Mary Butler
Maria Cardone	Rich Carothers	Sally Churgel	Alyson Crabtree	Durive Croake
Joel Cryer	Anthony Curtis	Bill DeLano	Jesse Desens	Diane Dick
Tracey Dickson	Tim Dixon	Craig Dobkin	Andre Hartmann Duha	Jerry Dusseau
Chuck Eaton	Patrick Farrell	Richard F. Flor	Gencer Emiroglu	Jackie Gerstein
Doug Gray	Roger Greenaway	Steven Gustafson	Katrina Geurkink	Ben Harris
David Hannegan	Tom Heck	Debbie Hensleigh	Laura Hipp	Carol Horner
Joseph Houde	Johan Hovelynck	Jasper Hunt	Craig Imler	Lisa Irvin
Eric Johnson	Abdul Kahlid	Erik Kampe	Jeanette Keiper	Kate Kenyon
Paul Kidder	Kathleen Konrad	Bruce Landry	Mario Koelblinger	Tom Leahy
Johnny Lee	Martin Lindner	Joe MacDonald	Susan Markley	Dave Moriah
Jake Mazulewicz	Bill Miller	Susan McAviney	Al Miller	Simon Priest
Robyn McCulloch	Ellen McIntire	Rich McLaughlin	Andy McSheffery	Chris Moore
Brent Munkres	Bill Murray	Jo Ann Morris-Scott	Gary Muszynski	Mark Nigro
Carl Oekerman	Glen Olson	Will Parks	Cheryl Perlitz	Anne Peterson
Michael Powers	Jay Roberts	Rachael Rodriguez	Chris Roland Beraaand	Rademaechers
Richard Romero	Greg Ross	Holger Schlichting	Julie Sciberras	Brett Sculthorp
Ng Kian Seng	Sam Sikes	Ron Smith	Harrison Snow	Dwight Steffes
Lesley Squillante	Cheri Torres	Bill Templeman	Sam Tower	Oswaldo Trejos
Al Tucker	Darin Ulmer	Betsey Upchurch	Juergen Vieth	Matt Vosmik
Andrew Walbart	Tim Walther	Todd Walther	Joyce Warner	Beth West
Jack Williams	Tollef Winslow	Torild Wraalsen	Joy Wyte	Zeke Zeliff

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## PREFACE

### Initiative Background

The Definition, Ethics and Exemplary Practices of Experiential Training and Development (DEEP ETD) Initiative began as the outgrowth of a number of conversations that took place in late 1996 and early 1997. Bill Proudman drafted and submitted the initial proposal in the early summer of 1997 to Ellerie Brownfain, chair of the Experienced-Based Training and Development (EBTD) Professional Group Leadership Council of the Association for Experiential Education (AEE). The Initiative was designed to:

1. Create a common working definition of Experiential Training and Development (ETD) that can be used by clients, providers and practitioners, the AEE's EBTD Professional Group, and others in the industry to better define the breadth and scope of the field.
2. Establish ethical guidelines for ETD practitioners.
3. Define exemplary practices of ETD services for providers and practitioners.

The initiative was launched in November 1997 at the EBTD pre-conference of the AEE International Conference in North Carolina, where the DEEP Task Force conducted a day long workshop with over 40 practitioners and providers engaging in dialogue about definition, ethics and best practice. Following this workshop, the Task Force met to refine the initiative process and to draft a call for involvement from ETD practitioners, providers and clients. In December 1998, a call for readers was mailed out to over 1000 ETD practitioners and providers, both members and non-members of AEE, informing them of this initiative and seeking their involvement.

The task force created the first version of the document in February 1998, based on the notes from the November '97 work session. This first document version was e-mailed to over 140 ETD providers, practitioners, in house trainers and OD practitioners and clients who identified themselves as willing to serve as readers. The intention throughout the process was to seek broad input from all quarters. This draft and review process continued through February 1999 and included a total of six meetings of the Task Force followed each time by commentary from members of the ETD reader group.

At the 1998 EBTD pre-conference at Lake Tahoe, the DEEP Task Force led a two day symposium that focused on document revisions and furthered dialogue about the needs of the profession. The Task Force submitted the finished DEEP document to AEE in early March 1999.

The EBTD Professional Group, the Task Force members and their sponsoring ETD companies jointly underwrote the initiative expense. The DEEP Task Force wishes to express its thanks to the EBTD PG and the sponsoring ETD Task Force member companies-- Performance Dynamics, Inc., Project Adventure, Inc., Falls River Center, Inc., PlayFully, Inc., Inclusivity Consulting Group, Inc., The Proudman Group, Inc., Axis Consulting, Inc. and Executive Edge, Inc. Without all of these contributions of both time and resources, the creation of this document would not have been possible.

### Intent of the DEEP ETD Document

The intent of this document is to:

- Articulate a working definition of ETD practice, a code of ethical conduct and exemplary practices for ETD providers and practitioners.

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- Encourage further dialogue between providers, practitioners and clients about ETD practices.
- Heighten the level of professionalism of the ETD field, contributing to the further enhancement and development of ETD client services.

The spirit of this document is to generate additional dialogue throughout the ETD profession. Having a working definition, code of ethical conduct and set of exemplary practices provides a starting point to continue to raise the standard of quality for the delivery of ETD services. From this starting point, the charge to us all is to continue the process collaboratively and collectively.

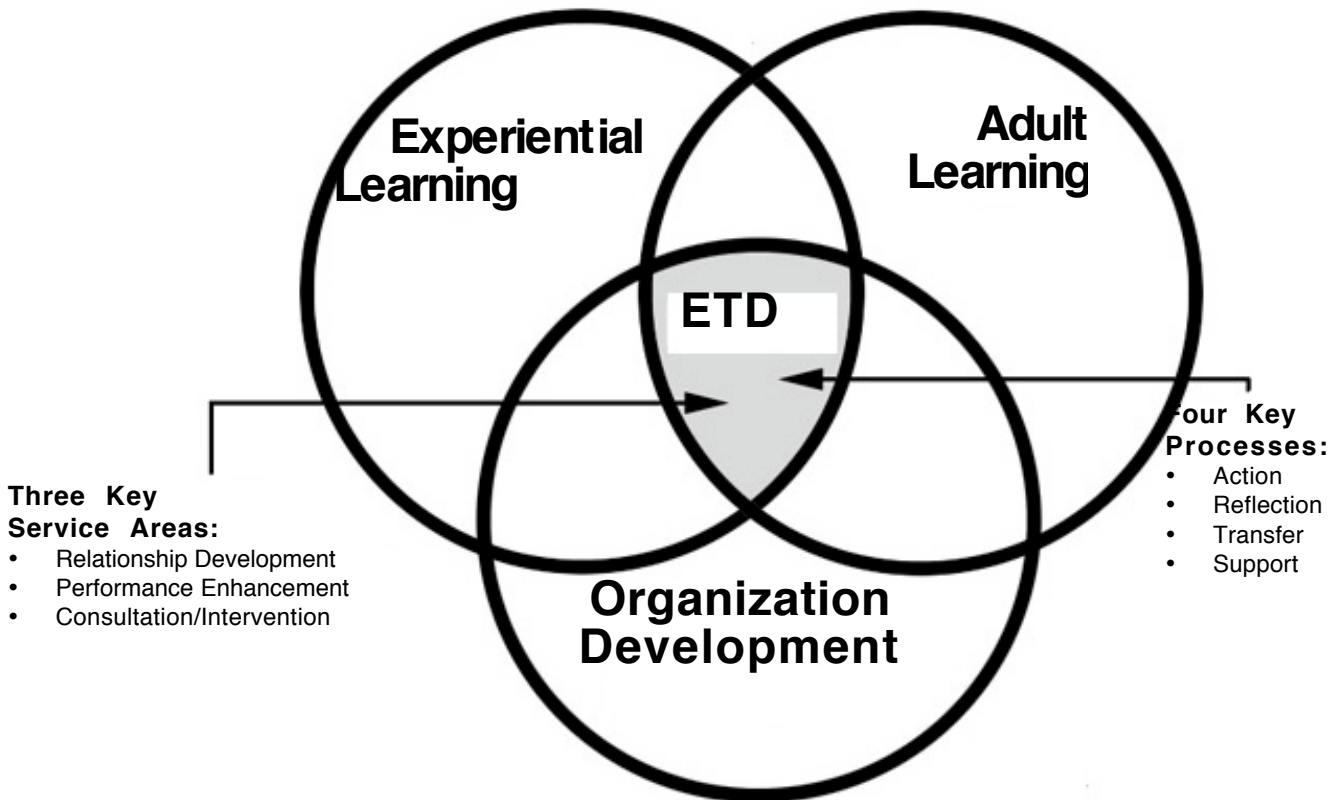
### **A Note to Providers about How to Use this Document**

ETD providers should use this document to further their own understanding and practice of ETD services. At present, there is no provider certification/endorsement system to denote provider compliance with any of the exemplary or ethical practices noted within. ETD providers are cautioned to use the information in this document to strengthen their practice of ETD rather than as marketing material that may denote adherence.

**I. EXPERIENTIAL TRAINING AND DEVELOPMENT DEFINITION**

**A. Definition**

Experiential Training and Development (ETD) is a client centered approach to individual, group, and organizational learning that engages the adult learner, using the elements of action, reflection, transfer, and support. ETD synthesizes knowledge from the practices of experiential learning, adult learning and organization development.



**B. Experiential Training and Development Operating Premises**

- A. ETD is a set of human and organizational services rooted in the provider’s knowledge of the client system, and aimed towards the healthy and profitable evolution of people and organizations.
- B. Learning involves an integration and/or change in the thoughts, feelings, attitudes, and behavior on the part of individuals, groups, and/or organizational cultures.
- C. Learning is a product of experience. Experience-based learning (action alone) becomes experiential when the elements of reflection (reflection optimizes learning), transfer (transfer applies learning), and support (support maintains transfer) are present.
- D. The capacity to learn as an adult is more effective when the whole person is engaged – the thinking, feeling, and behavioral domains. For example, information that is synthesized with emotions, values, and actions produces learning that is more lasting than mere memorization of facts.

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- E. Training involves transferring specific “task-oriented” learning between similar settings. For example, a project-management spreadsheet or employee appraisal system, newly learned through a classroom, can then be applied in the job.
- F. Development involves transferring general “process-oriented” learning between very different settings. For example, collaborative problem solving or conflict resolution approaches, learned in a team building session, can then be applied back in the office.
- G. ETD providers and businesses grow and develop by continually striving to offer high value to the clients and marketplace as they evolve. This requires an adequate focus on client organizations’ business outcomes (e.g. effectiveness, efficiencies, quality, cost) as well as individual participants’ needs, and ETD models and methodologies.

### C. Service Areas

ETD practitioners serve client organizations in any one or a combination of three areas:

**Relationship Development** -- services which enhance interactions and motivate individuals through short-term events. Examples include energizing, incentive/reward, networking and celebration events. These events are purposeful and incorporate elements of reflection, transfer and support, as distinct from entertainment and recreation events, which do not.

**Performance Enhancement** -- training in skills and competencies that results in improvement of personal, team and organizational effectiveness. Examples include communication skills, executive coaching, performance management and conflict resolution.

**Consultation/Intervention** -- services addressing the interaction between behavior (individual, leadership, and team) and business setting elements (e.g. reporting line structures, communication and decision-making processes, incentive / compensation systems). Activities may include analyzing misalignments among these pieces, advisement on possible growth / change initiatives, and coaching.

## **II. ETD ETHICAL GUIDELINES**

Establishing a set of ethical guidelines is a critical step in the professional development of the ETD community. The guidelines are meant to provide a baseline for behavior among colleagues, and to support a constructive dialogue in the development of ETD.

By establishing a set of ethical guidelines, the ETD profession aspires to raise the level of professionalism in the field. The ethical guidelines are not intended as a punitive tool for ETD providers but, rather, to serve to increase credibility and recognition in the marketplace.

As an ETD practitioner, I am committed to supporting and acting in accordance with the following ethical guidelines:

### **A. Responsibility to Self**

1. Act with personal integrity.
2. Strive continually to assess and upgrade my self-knowledge and personal growth.
3. Recognize my own personal needs and desires; and, when they conflict with professional responsibilities, seek an all-win resolution.
4. Assert my own economic and financial interests in ways that are fair and equitable.

### **B. Responsibility for Professional Development and Conduct**

1. Define, seek to understand, and pursue a set of core values aligned with my professional practice.
2. Accept responsibility for the consequences of my actions and make reasonable efforts to assure that my services are properly used.
3. Strive to achieve and maintain a professional level of competence for both my profession and myself by developing the full range of my own competence and by establishing collegial and cooperative relations with other practitioners.
4. Practice within the limits of my competence, culture and experiences in providing services and using techniques.
5. Honor commitments and agreements.
6. Gain permission for the use of other's original materials.

### **C. Responsibility to Clients/Customers**

1. Serve the long-term interests of clients, even when the work being done has a short term focus.
2. Conduct any professional activity, program, or relationship in ways that are honest and responsible.
3. Establish agreement on a contract covering services, expectations, remuneration and insurance where appropriate.
4. Deal with conflicts constructively.
5. Identify and minimize conflicts of interest.
6. Determine what information is confidential, and protect the confidentiality of client-professional relationships, including medical information.
7. Be truthful and fair in representing services provided to clients.
8. Acknowledge and manage the possibility that the client objectives may conflict with the needs of individuals.
9. Manage the emotional and physical safety of individuals.
10. Provide information on potential physical and emotional risks, which allows for informed consent by individuals.



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11. Bill fees and expenses honestly.

### **D. Responsibility to Profession**

1. Contribute to continuing professional development for myself, other practitioners, and the profession.
2. Promote the sharing of knowledge and skills.
3. Work with other practitioners in ways that promote exemplary professional practices.
4. Actively promote ethical practices by individuals and organizations engaged in ETD services and, in a case of questionable practices, use appropriate channels for resolution.
5. Act in ways that bring credit and goodwill to the ETD profession.
6. Give due respect to colleagues in ETD and other professions.

### **E. Global Responsibility**

1. Act with sensitivity to the facts that my actions and recommendations may affect the lives and well being of individuals.
2. Act to deepen my understanding of the cultural filters that affect my view of the world.
3. Respect cultures different from my own. Be sensitive to cross-cultural differences and their implications.
4. Be aware of how issues of human rights, power, and social justice surface in our work and address them appropriately.
5. Model sound environmental and ecological practices.

### **III. EXEMPLARY PRACTICES**

What follows are methods and approaches which exemplary providers and practitioners use in delivering ETD services. In choosing how to apply exemplary practices, providers and practitioners focus on their own strengths and limitations, as well as on their client's unique situation, needs and objectives.

#### **A. Client Services**

##### **1. Definition of Client Service**

ETD client services are divided into three service areas.

- 1.1 **Relationship Development** -- services which enhance interactions and motivate individuals through short-term events. Examples include energizing, incentive/reward, networking and celebration events. These events are purposeful and incorporate elements of reflection, transfer and support, as distinct from entertainment and recreation events, which do not.
- 1.2 **Performance Enhancement** -- training in skills and competencies that results in improvement of personal, team and organizational effectiveness. Examples include communication skills, executive coaching, performance management and conflict resolution.
- 1.3 **Consultation/Intervention** -- services addressing the interaction between behavior (individual, leadership, and team) and business setting elements (e.g. reporting line structures, communication and decision-making processes, incentive / compensation systems). Activities may include analyzing misalignments among these pieces, advisement on possible growth / change initiatives, and coaching.

##### **2. Design and Delivery**

- 2.1 Providers shall perform some degree of needs assessment appropriate to outcomes desired by client.
- 2.2 Assessment is an ongoing process that can be initiated prior to design, to match service to client need(s).
- 2.3 Design and delivery are client-centered, based on assessment results.
- 2.4 Design and delivery shall be informed and supported by current knowledge, practices, and research in the field.
- 2.5 Assessment and design refinement can occur in real time while services are being delivered.

##### **3. Evaluation**

- 3.1 Providers shall seek and incorporate evaluative feedback into ongoing implementation of services including information on employees or sub-contractors.
- 3.2 Providers shall ensure some form of follow-up to assess client satisfaction and convey relevant observations/feedback. Depth and scope of evaluations will vary by client service area.

**B. Business Operations**

**1. Mission/Philosophy**

- 1.1 Providers shall define, provide access to, and act in adherence to a statement of mission, vision and core values.

**2. Administration**

- 2.1 Providers shall, in all service areas, practice informed consent.
- 2.2 First aid training and defined medical emergency service procedures shall be appropriate to the nature of service activities.
- 2.3 Providers shall follow and document adherence to appropriate safety and risk management procedures in the provision of services.
- 2.4 Providers shall obtain documents on training, certification, and experience on all personnel and sub-contractors as appropriate to the nature of the service activities.
- 2.5 Providers shall create and maintain appropriate client documentation (including but not limited to client assessments, services provided, feedback, and associated correspondence).
- 2.6 Providers shall adhere to any legal, copyright, licensing, permit, insurance, and fiscal responsibility requirements by governmental, community, professional, and client entities.

**3. Sales and Marketing**

- 3.1 Providers' sales and marketing practices shall accurately and honestly represent their services.

**C. Business Relationships**

**1. Relationships with Clients and Individuals**

- 1.1 Providers shall have a clear method of contracting with clients (including, but not limited to expectations, fees and services).
- 1.2 Providers shall understand and reach agreement about confidentiality and informed consent.
- 1.3 Providers shall define and clarify roles and responsibilities.

**2. Relationships with Personnel and Sub-Contractors**

- 2.1 Providers shall clarify scope of work, roles and responsibilities prior to providing services.
- 2.2 Providers shall clearly describe how sub-contractors should represent provider's interests and client relationship.
- 2.3 Providers shall have clear agreements regarding compensation, liability, medical coverage, and assumption of risk prior to service delivery.
- 2.4 Providers shall contribute to the professional development of the people that work for and with them.

**3. Relationships with Colleagues and Other Providers**

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- 3.1 Practitioners/Providers shall seek out permission to use other's proprietary material giving credit and compensation where appropriate and where agreed to by the originator. These agreements shall exceed legal requirements and be guided by the practitioners/providers' personal integrity.
- 3.2 Practitioners/Providers shall refer to other providers and clients in a neutral or supportive way.
- 3.3 Practitioners/Providers shall attend to concerns and potential conflicts directly and use appropriate conflict resolution processes.

### **4. Contribution to the Profession and Community**

- 4.1 Practitioners shall share best practices, making an intentional effort to better the profession.
- 4.2 Practitioners shall contribute their time and expertise to advance the profession.
- 4.3 Practitioners shall contribute time and resources to serve their community and preserve the local environment.

### **D. Practitioner Competencies**

This section offers professional competencies which practitioners should aspire to. The section is divided into general skills (those which are applicable to all service areas), followed by three segments which cite skills relevant to each ETD service area. Practitioners are additionally encouraged to affiliate with other specialized organizations, some of which are named in Appendix A.

#### **1. General Skills**

##### **1.1 Personal Development**

- 1.1.1 Practitioners have the ability and commitment to explore their own strengths and weaknesses, and pursue opportunities for development.
- 1.1.2 Practitioners acknowledge their own affect, biases, judgments and preconceptions and how they influence others.
- 1.1.3 Practitioners have adequate knowledge and experience (e.g. experiential education, adult learning, organization development) consistent with the ETD service provided to the client.
- 1.1.4 Practitioners interact with each other to support personal/professional growth and development.

##### **1.2 Client Relations and Development**

- 1.2.1 Practitioners are able to define the scope of work with the client.
- 1.2.2 Practitioners are able to set a context/environment that promotes meaningful learning outcomes.
- 1.2.3 Practitioners are able to create and sustain a physically and emotionally safe environment.
- 1.2.4 Practitioners utilize knowledge of industry standards, systems, trends, and models in designing and providing services.
- 1.2.5 Practitioners lead and coach others to help them achieve desired results.
- 1.2.6 Practitioners understand adult learning styles and how they may be applied to client issues.
- 1.2.7 Practitioners understand industry trends.

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## 1.3 Assessment and Design

- 1.3.1 Practitioners understand models of organization development.
- 1.3.2 Practitioners are able to appropriately utilize assessment tools, and involve the client in the assessment process.
- 1.3.3 Practitioners are able to assess client needs and design services to achieve desired outcomes.

## 1.4 Implementation

- 1.4.1 Practitioners are able to assist clients in understanding the relationship between task and process.
- 1.4.2 Practitioners apply effective verbal, non-verbal, and written communication skills to assist clients achieve desired results.
- 1.4.3 Practitioners effectively utilize presentation methods and materials that focus individuals on learning outcomes.
- 1.4.4 Practitioners have an understanding of sequencing as appropriate for various types of client services.
- 1.4.5 Practitioners are knowledgeable of, and provide wherever possible services, that are inclusive of others regardless of varying abilities/differences.
- 1.4.6 Practitioners are able to provide services that are culturally appropriate.
- 1.4.7 Practitioners are able to lead, influence, and coach others to help them achieve their desired results or goals.

## 1.5 Evaluation

- 1.5.1 Practitioners use the appropriate evaluative tools to measure learning outcomes.

## 2. Practitioner Competencies for Relationship Development Service Area

### 2.1 Assessment & Design

Additional competencies required of ETD practitioners providing relationship development services:

- 2.1.1 Gather and analyze client needs and goals.
- 2.1.2 Select appropriate site and activities considering participant ability, group size, goals, weather, staff ratios, etc.
- 2.1.3 Design an engaging, inter-active process which:
  - Quickly connects people.
  - Creates high involvement in a short time.
  - Supports rapport and an atmosphere of fun.
- 2.1.4 Clearly convey services that will be provided and limitations and benefits.

### 2.2 Facilitation

Additional competencies required of ETD practitioners providing relationship development services:

- 2.2.1 Employ effective presentation skills.

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- 2.2.2 Ensure physical, emotional, intellectual safety as required (i.e. spotting, group movement, gender issues, etc.)
- 2.2.3 “Read” the group and modify plan as needed.
- 2.2.4 Are engaged and present during the event.
- 2.2.5 Identify relevant issues and bring learning points in real-time (as appropriate to client need).
- 2.2.6 Debrief appropriately.
- 2.2.7 Have basic knowledge of client and business.
- 2.2.8 Ask questions to prompt interactive dialogue.
- 2.2.9 Set-up operating norms (as appropriate) to guide dialogue and discussion.
- 2.2.10 Solicit input from all participants.
- 2.2.11 Bring appropriate closure to group discussion.

### **2.3 Follow-Up**

Additional competencies required of ETD practitioners providing relationship development services:

- 2.3.1 Provide post event client contact to assess effectiveness.

## **3. Practitioner Competencies for Performance Enhancement Service Area**

### **3.1 Assessment & Design**

Additional competencies required of ETD practitioners providing performance enhancement services (e.g. knowledge/skill training):

- 3.1.1 Analyze performance gaps between current behavioral competencies and required workplace skills/abilities.
- 3.1.2 Possess relevant knowledge and expertise in training area.
- 3.1.3 Have appropriate certifications/trainings in content areas.

### **3.2 Implementation**

Additional competencies required of ETD practitioners providing performance enhancement services (e.g. knowledge/skill training):

- 3.2.1 Knowledge of business context in which skills will be applied and the benefit to participants’ workplace performance.
- 3.2.2 Align and link skill enhancement service with organizational context (e.g. mission, culture, systems, structures).

### **3.3 Follow through**

Additional competencies required of ETD practitioners providing performance enhancement services (e.g. knowledge/skill training):

- 3.3.1 Promote transfer and sustainability of enhanced skills in the workplace
- 3.3.2 Offer follow-up evaluation tools/methods to promote long term efficacy.

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### **4. Practitioner Competencies for Consultation/ Intervention Service Area**

#### **4.1 Initial Client Contact**

Additional competencies required of ETD practitioners providing consultation/intervention services:

- 4.1.1 Sufficiently establish client relationship and demonstrate an understanding of:
  - Client's values, history, philosophy and vision.
  - Client's business and their industry context
- 4.1.2 Understand and appropriately apply principles of organization theory and development to:
  - Create interventions and change strategies which allow the organization to improve.
  - Identify and mobilize formal and informal power/political forces to ensure adequate support for ETD services.
  - Facilitate identification of "real" issues as they begin to emerge ("problem identification"). Research root causes.
  - Foster collaborative assessment and ownership of proposed action steps by client.
  - Identify the needs, drivers and readiness for change.

#### **4.2 Implementation**

Additional competencies required of ETD practitioners providing consultation/intervention services:

- 4.2.1 Synthesize assessment data into themes and central challenges.
- 4.2.2 Build steps to elicit buy-in and to minimize organizational barriers (i.e. structures, operational processes, and policies).
- 4.2.3 Understand how business systems interrelate (e.g. team/employee effectiveness and recognition/compensation practices) and how they potentially impact each other.
- 4.2.4 Link ongoing human performance changes with organizational elements (e.g. systems, structures, processes, and policies).

#### **4.3 Follow through**

Additional competencies required of ETD practitioners providing consultation/intervention services:

- 4.3.1 Maintain ongoing client relationship and identify next steps to maximize effectiveness of ETD services over time.
- 4.3.2 Evaluate ETD service outcomes within the broader context of organizational elements (e.g. systems, structures, processes, and policies).

## **IV. GLOSSARY OF TERMS**

These definitions are meant to be contextual for use with this document.

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**Adult Learning:** The life long capacity to develop and grow emotionally, spiritually, intellectually.

**Adventure-Based Learning:** A learning process characterized by perceived risks and unknown outcomes, historically associated with but not limited to outdoor activities (e.g. wilderness travel, rock climbing, challenge course, etc.)

**Challenge Course:** Any program and/or site that utilizes one or all of the following: elements that require belaying, elements that require spotting, and initiatives (from Association for Challenge Course Technology's Technical Standards for Challenge Course Facilitators)

**Client-Centered:** A provider's approach to customer interaction which maintains the client's needs and wants as the top focus and priority at all times.

**Client/Customer:** The primary contact throughout the delivery of the ETD service, with whom the provider negotiates the scope of services (e.g. the desired outcomes, contractual agreements, remuneration, evaluation and ongoing communication).

**Colleagues:** Practitioners who contribute to the betterment of the ETD profession through collaboration and competition.

**Consultant:** Individual who assesses organizational systems and human interactions to assist in the design and development of interventions toward a designated end.

**Exemplary Practices:** Methods and approaches that adept and skillful providers and practitioners use in delivering ETD services, which reflect positively on the profession.

**Experience-Based:** An action-based process by which knowledge, skills, and values are derived from direct experience. Learning and behavior change occurs when this experience is integrated and applied through reflection and interactive discussion. May be indoors or out.

**Experiential Education and Learning:** A process through which a learner constructs knowledge, skill and value from direct experience.\* Experiential education and learning encompasses a wide variety of teaching methods including, but not limited to, outdoor challenge course, adventure-based programming, organization training and development, simulations, cooperative education, and counseling / therapeutic education. (\* from the Association for Experiential Education's definition of experiential education)

**Facilitator:** An individual responsible for managing the learning environment to assist individuals/groups to achieve value from the learning process.

**Individual:** One of the direct recipients of ETD services. May or may not include the client. Other recipients include organizational entities (divisions and departments), management teams, and work groups.

**Informed Consent:** The ongoing relationship of providing relevant information which allows all individuals to choose and agree to their level of engagement.

**Integrity:** The consistent congruence between practitioner's values and beliefs with one's words and actions.

**Intervention:** Involves the interruption of a process or event to draw attention to patterns of behavior as they serve or impede the defined objectives of both the group and the individuals. Subsequent action steps are developed.



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**Needs Assessment:** A diagnostic process to gather information on organizational context, culture and interpersonal dynamics to determine the goals and objectives for the design of the ETD services to be delivered.

**Organization Development:** Focuses on the process of human interaction, leadership skills and team performance, as businesses grow or adapt in a changing environment. OD practitioners typically work with clients or individuals over time to achieve alignment around core values and business purposes.

**Practitioner:** The individual with the capabilities to deliver an ETD service. May be a trainer, facilitator or consultant.

**Process:** The way people interrelate to accomplish a task. The "how."

**Provider/Contractor:** The organization/individual responsible for offering and contracting ETD services to clients.

**Reflection:** A process of considering what has happened and extracting appropriate learning from an experience.

**Sub-Contractor:** Practitioner or provider who delivers ETD services for the primary provider, but is not an employee of the primary provider.

**Task:** The business of accomplishing specific goals and objectives. The "what."

**Trainer:** Practitioner who leads and directs prescribed learning for skill development, toward measurable explicit results.

**Training:** "Task" oriented learning designed for explicit, measurable skill development, delivered in a prescribed way.

**Transfer:** A process wherein participants apply learning from their direct experience to another context/environment (i.e. to their work environment).

**Support:** The application of tools and techniques to extend and reinforce a participant's learning over time (i.e. mid-service check-ins to fine-tune the process, follow-up meeting to reinforce the learning from an earlier ETD service event).

**APPENDIX A**

**Other Organizations With Practitioner Competency Materials**

American Society for Training and Development  
1640 King Street; Box 1443  
Alexandria, VA 22313-2043  
(703) 683-8100  
(Web page, [www.astd.org](http://www.astd.org), publications on training and development)

Association for Challenge Course Technology  
PO Box 970  
Purcellville, VA 20134  
(540) 668-6634  
(Document on technical standards for challenge course facilitators)

International Association of Facilitators  
7630 W 145th St; Suite 202  
St Paul, MN 55124  
(612) 891-3541

The Organization Development Institute  
11234 Walnut Ridge Road  
Chesterland, OH 44026  
(What's New in Organization Development, Cole, Preston and Finlay, 1994)

Organization Development Network  
76 South Orange Ave; Suite 101  
South Orange, NJ 07079-1923  
(973) 763-7337